



Best-in-Class Wellness Programs



Valuable Insights | Ohio Healthiest Employers

Ohio Employee Health & Wellness Conference

Tuesday, August 29, 2023



Thanks for joining us today!



Lindsay Madaras
Sr. Manager, Associate Well-Being



Maile Kusano
LivingWell Project Manager





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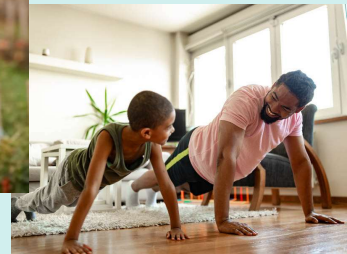
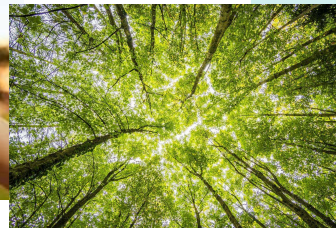


We proudly do wellness like no one else.

Associates at Bread Financial get exclusive access to LivingWell—an industry-leading **holistic well-being program** that offers simple, inclusive, no to low-cost solutions that meet them wherever they are on their wellness journey.

LivingWell offers:

- Annual LivingWell Reward (reimbursement towards eligible expenses)
- On-demand stress management resources
- Financial education (on-demand, live workshops and one-on-one)
- Interactive challenges focused on movement, mindfulness, nutrition, sleep, etc.
- On-site Fitness Centers (certain locations) and free virtual fitness classes
- Fertility, surrogacy and adoption support
- Support for new parents (e.g., lactation suites, paid time for breastfeeding/pumping)
- Tobacco free workplace and support for quitting



Featured Wellness Support:



Access to BrightPlan's robust **financial wellness platform** and unlimited calls with a **CERTIFIED FINANCIAL PLANNER™ (CFP)** at no cost



Confidential, no cost mental health support from **Spring Health** (includes care navigation, six free therapy sessions per year, unlimited coaching, and more)



Student loan repayment support from **Candidly**, a no cost resource that provides personalized, actionable guidance to help borrow, repay and save smarter

LivingWell pillars










Differentiators:

- No incentive portal
- Events offered on paid time
- Leadership buy-in
- Utilize associate data
- DE&I focus

Emotional wellness

Spring Health

-  Personalized recommendations
-  Dedicated support
-  Digital wellness exercises
-  Coaching
-  Therapy
-  24/7 crisis support
-  Work-life resources



Short (4-6 min) **guided audio recordings** designed to help you relax, relieve tension, and refocus

Financial confidence



BrightPlan[®]



Exclusive financial planning education



Personalized advice, at your fingertips



Spending insights & monthly budget



A custom plan for every goal



Investment analysis & advice



1:1 financial planner access



Education topics:

April: Smart money fundamentals

May: Home buying

June: Managing debt

July: Make the most of your financial benefits

August: Understand and improve your credit score

September: Net worth & wealth building 101

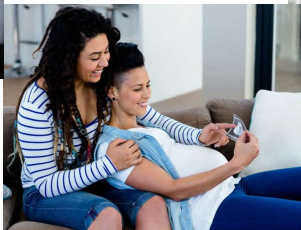
October: Maximize your 401(k) & retirement

Life events & support



Support for all paths to parenthood, including:

- A specialized patient care advocate
- A highly integrated & centralized claims experience
- Surrogacy and adoption reimbursement



Caregiver Resource Hub

Features resources specific to those who are:

- Caring for an elderly person
- Caring for someone with a neurodiversity
- Caring for someone with a disability

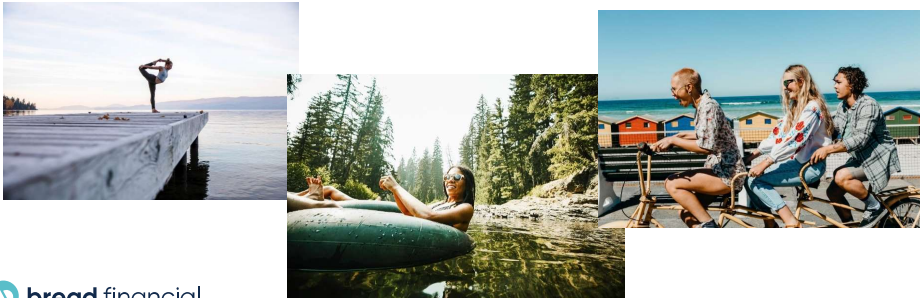
Plus:

- Resources for parents
- Resources addressing caregiving stress

Self-care

LivingWell Reward

- **\$400/year** to use on eligible well-being categories
- **Easy-to-use** submission platform
- A wide range of **eligible expense categories** related to movement and mindfulness
- Associates can use the funds for **themselves or their immediate family members**



Join the Monthly Movement Challenge

- One week challenge each month
- Focus on **one simple movement**
- Engagement and communication through **Microsoft Teams**
- Participants keep track of their number of reps; enter into survey at end of challenge
- Chance to win prizes





Questions?



Email us at:

LivingWell@breadfinancial.com



Best in Class Wellness Programs...
Successes at Achieving a Culture of Health,
Wellness & Well-Being

16th Annual Employee Health & Wellness Conference
August 29, 2023

Elizabeth Click, DNP, ND, RN, CWP
Medical Director & Associate Professor
Case Western Reserve University

CWRU Resources

- University Wellness Program
 - For Benefits-eligible Faculty and Staff
 - Housed within Human Resources
- Student Wellness Initiative
 - For Undergraduate & Graduate Students
 - Housed within University Health and Counseling Services



University Wellness Program

Wellness Program Categories

- Physical Activity
- Stress Management
- Nutrition and/or Weight Management
- Financial Well-being
- Community Well-being
- Sleep
- Tobacco Cessation
- General Wellness

www.case.edu/wellness/faculty/staff

EARN AN EXTRA \$500 IN 2024

BEFORE NOVEMBER 30TH

NOTE: HRA required then at least 2 other activities

Complete your Health Risk Assessment
+
Complete TWO of these THREE Activities:

1. Biometric Screening - On Campus, at a Quest Location or with a Physician Results Form* and/or
2. Tobacco Attestation in HCM and/or
3. Primary Care Provider Attestation In HCM

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\$25/MONTH IN 2024

EARN UP TO \$200 MORE IN DECEMBER 2024

Complete up to TWO classes or related Wellness Programs in person or on-line

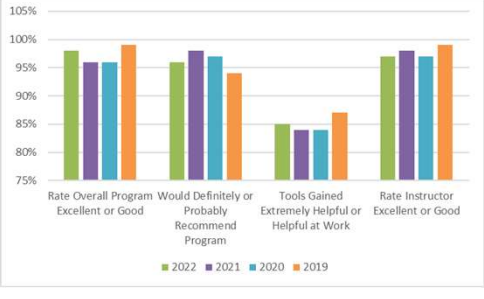
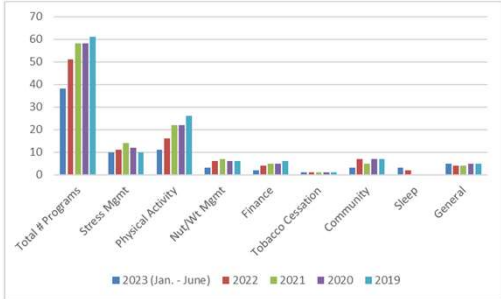
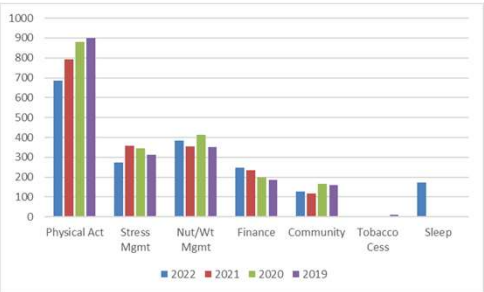
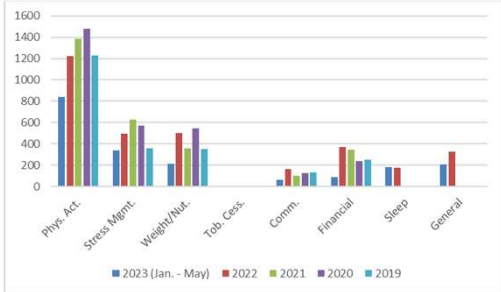
Verify Criteria met on the Wellness Website

Attest to Program Completion in HCM

case.edu/wellness/facultystaff

Please contact Elizabeth Click at erc10@case.edu or Deanna Duffy at dxd516@case.edu with any questions!

Participation Data



Student Wellness Program

- Mental Health and Substance Use Support Meeting
- BIPOC Support Space
- STI Testing
- Wellness Wednesday Talks (DEI focus)
- Koru Mindfulness
- Guided Meditations
- Anxiety/Depression
- T.H.I.N.K. Suicide Prevention Training
- Recovery Support Meeting
- Light the Campus – Day of Remembrance
- REACH OUT App
- Wellness Ambassadors
- Quit Smoking
- Alcohol and Drugs

History of Collaboration

- 2014 – University Wellness Program for Faculty & Staff Initiated
- 2016 – Executive Director for University Health & Counseling Services (UH&CS) Named
- 2017 – Associate Director of Wellness Position Created & Filled within UH&CS
- 2018 – First Collaborative Wellness Event Offered

Year/Semester	Topic	Activities
Fall 2017	Stress Management	Midday Getaway - Fall Into Wellness Presentation
Spring 2018	Sleep	Sleep Hygiene Presentation by Physician Sleep Expert
Fall 2018	Physical Activity	#WalkCWRU Challenge with Weekly Campus Walks
Spring 2019	Gratitude	Gratitude Presentation & 30 Day Gratitude Challenge
Fall 2019	Mental Health	Motivational Mental Health/Suicide Prevention Speaker
Spring 2020	Hydration & Happiness	Water Challenge; 7-Day Happiness Initiative
Fall 2020	Preventive Health	Flu Shots & COVID Precautions Marketing & Communication
Spring 2021	Mental Health	Mental Health Matters Series & On-site Counselor Role
Fall 2021	Mental Health	T.H.I.N.K. Training; Active Minds' "Send Silence Packing"
Spring 2022	Skip	Skip
Fall 2022	Physical Activity	#Find Your Space Scavenger Hunt

Ongoing Collaboration

- Dept. of Nutrition
- University Farm
- Public Safety Dept.
- Faculty
- Employee Assistance Program
- Staff Advisory Committee
- Professional Development Center
- Mindfulness Matters Faculty project
- Faculty Senate Well-Being, Community & Engagement Committee
- Walk & Talk Series – Student Affairs, One to One Fitness Center, Garden@Case, Veale Center for Entrepreneurship, Sustainability, Provost's Office
- Vendors – Eldercare Professionals of Ohio, LLC; Courage to Caregivers; Reflection Point/That Can Be Me, LLC; Functional Nutritionists; WW; Omada; Quest; WebMD; Medical Mutual; Avidon Health; etc.



Outcomes Associated with Collaborative Wellness Programming

- Builds Connections & Community On Campus
- Provides Opportunity for Expansion of Effort/Capacity
- Creates a Shared Language for Wellness
- Expands the Culture of Wellness within the University
- Permits a Shared Understanding of Our Similarities



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Lindsay Madaras, MA

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Lindsay brought her creativity and passion for health and wellness to Bread Financial (previously Alliance Data) in May of 2013 and was charged with building a wellness culture from the ground up. The result was LivingWell, an award-winning program that encompasses an array of holistic well-being programs and initiatives offered to the organization's 7,500 associates across the U.S., as well as its office in Bangalore, India. Along the way, Lindsay helped the organization evolve to a point where wellness programs are offered on paid time in its call centers, and innovative practices such as "mindful moments," financial wellness education, and movement challenges are the norm. Through a mixture of strategic partnerships and internal programming, LivingWell aims to positively impact the lives of Bread Financial associates and their families by providing simple, inclusive, no-cost solutions under the pillars of Self-Care, Emotional Wellness, Financial Confidence, and Life Events.

Lindsay received her bachelor's degree from Kenyon College and obtained her master's degree in Health & Exercise Science from The Ohio State University. She is currently on a quest to run a marathon on every continent (six down, one to go—Antarctica!).

Maile Kusano, MS

LivingWell Project Manager

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Founded in 1996 Bread Financial (previously Alliance Data) is a tech-forward financial services company that provide simple, personalized payment, lending and saving solutions. Maile brings 25+ years of wellness experience to Bread Financial. She helps lead the LivingWell program for 7,500+ associates globally and is focused on creating a work culture centered-around holistic well-being. Prior to Bread Financial, Maile worked for EXOS as the Director of Field Operations. She received her Bachelor's Degree from Springfield College and obtained her Master's Degree in Exercise Physiology from the University of Dayton. She is an avid Red Sox fan and loves to travel with her family to as many new places as possible!



Biographical Information

**Elizabeth R. Click, DNP, ND, RN, CWP, Medical Director
Associate Professor, FPB School of Nursing
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Dr. Click is the Medical Director, and an Associate Professor, at Case Western Reserve University. She created and directs the university's faculty/staff wellness program and provides strategic support for the implementation of population health initiatives. Her professional pursuits focus on wellness and behavior change efforts for individuals and groups within corporate and academic organizations. Dr. Click received her DNP from CWRU and has a B.A. from the College of Wooster. She is a Certified Wellness Practitioner. Prior to joining the CWRU faculty, Dr. Click managed the wellness training program at The Progressive Corporation in Cleveland, Ohio.